Project Close-Out

Overview

The last major phase of a project's life cycle is the close-out. Closing a project should be a fairly routine process.

The key elements to project close-out are:

- Accepting the project's products indicated by user sign-off

- Completing the Post Implementation Evaluation Report (PIER)

- Disbursing the resources—staff, facilities, and automated systems

- Conducting a lessons learned session

- Completing and archiving all final project records

- Recognizing outstanding achievement

- Celebrating project completion

These activities are particularly important on large projects with extensive records and resources.

This section does not address processes for transitioning the technical support into maintenance and operation. These tasks are diverse and unique to the specific development environment of a project.

The first step of the close-out process is the user's acceptance of the system. This is a critical and important step, as the user decides when the project is completed. Acceptance is based upon the success criteria defined in the very early initiating and planning stages of the project. This acceptance should be formal, meaning that physical sign-offs should be obtained.

Project Close-Out

Post Implementation Evaluation Report and Archiving

What is a Post Implementation Evaluation Report?

A Post Implementation Evaluation Report (PIER) documents the history of a project. It provides a record of the planned and actual budget and schedule. The report also contains recommendations for other projects of similar size and scope.

The PIER will be stored on the state agencies database as well as at OIT. The PIER Table of Contents should look like the following:

- Project organization including staffing and skills

- Schedules

- Successful risk assessment and mitigation techniques, i.e. What risks occurred and what techniques were used to mitigate these risks

- Processes used for change control, quality, and configuration management (References only)

- General techniques used for project communication

- General techniques for handling customer expectations

- Success factors and how they were met

- Financial data

- Lessons Learned (from lessons learned session)

- Recommendations to future project managers

Identifying and Addressing Success

Be certain that successes as well as problems on the project are identified in the PIER. Be certain to include new ideas that were very successful on the project. Make recommendations on how these processes might be adapted for other projects.

Share the project successes with other organizations. In the same way that problem identification can lead to improvements, successes must be shared so they can be repeated. Where possible, successes should be translated into procedures that will be followed by future projects.

Who Prepares the Report?

The project manager has responsibility for preparing the report. The project manager gets input from the entire project team, the users, and other major stakeholders. People performing different functions on the project will have a different outlook on the successes and failures and on possible solutions. If every project member cannot be consulted, at least ensure that a representative from each major area of the project participates. The users' overall view of the project and its final product is also a major focus of the project. It is this view, along with the view of the major stakeholders that lives on after closure has been completed.

Project Close-Out

Collecting Project Data

Following preparation of the Post Implementation Evaluation Report, the project database is archived. Historic project data is an important source of information to help improve future projects.

Typically, the following project data is archived:

- PIER

- Project Plan

- Project Management Control Documents
  - ⇨ Correspondence
  - ⇨ Relevant Meeting Notes
  - ⇨ Status Reports
  - ⇨ Contract Files

- Technical documents

- Information that had been placed under configuration management

All the hard copy records should be stored following record retention guidelines. Many of the technical records and automated versions will be turned over to personnel responsible for maintenance and operation of the system. The project archive includes a description of the files being submitted, the application (including version) used to create the archived materials, and a point of contact if further information is needed.

Where is the Archive Maintained?

OIT will maintain an archive of State information technology projects that includes only project summary information. The more detailed information is archived at the state organization. The archive at OIT will be available on the OIT website.

How is the Archived Material Used?

Building a repository of past projects serves as both a reference source for estimating other efforts and as a training tool for project managers.

Project archives can be used when estimating projects and in developing metrics on probable productivity of the new project teams.   Use of past performance metrics provides the best source for future estimates. When sufficient project data is collected over time, the state may be able to develop an experience database that will help to make better estimates and develop realistic project plans.

Project Close-Out

Recognition of Success

Celebrate the success of completing a project!

There is fairly universal recognition that positive reinforcement, or rewarding behavior, is an effective management tool. Since it is a goal within the State to execute all projects successfully, it is important to recognize teams that have met this goal. When success in a project is achieved, be certain to provide some recognition to the team. If individuals are singled out for significant achievements, don't forget to recognize the entire team as well.

> *"Compensation is what you give people for doing the job they were hired to do. Recognition, on the other hand, celebrates an effort beyond the call of duty."*

There are many ways to reward people for a job well done. The reward might be an informal after work gathering or a lunch-time pizza celebration. If people are willing to chip in, you could provide T-shirts or mugs that commemorate the event.

Management may also want to express recognition of a successful team effort by praising the team at a key meeting or a large gathering of staff. People are proud to have senior management appreciation stated, and such recognition sets the stage for future successful work.

Formal recognition can also be achieved through coordination with the Missouri Office of Information Technology for articles in industry periodicals and by updating the project data that is circulated to the legislature.

What is Success?

Success is defined at the early stages of planning the project. Initial success factors are developed as part of the initiating phase. Success is not tied only to budget and schedule. Many projects can be considered a tremendous success even though the project did ultimately cost more than had been anticipated.

Some key questions that determine success are:

- Were the success factors achieved?
- Do the stakeholders and end-users view in a positive manner the project product?
- Was the project well-managed?
- Did the team work well together?

Project Close-Out

Recognition and Celebration of Success

Conduct a Lessons Learned Session

In addition to communicating the closure of a project in writing, it is also advisable to have a mechanism for group review. A "lessons learned" session is a valuable closure mechanism for team members, regardless of the project's success. Some typical questions to answer in such a session include:

- Did the delivered product meet the specified requirements and goals of the project?

- Was the user/client satisfied with the end product?

- Were cost budgets met?

- Was the schedule met?

- Were risks identified and mitigated?

- Did the project management methodology work?

- What could be done to improve the process?

The lessons learned session is typically a meeting that includes:

- Project team

- Stakeholder representation - including external project oversight, auditor or QA

- Executive management

- Maintenance and operation staff

Such a session provides official closure to a project. It also provides a forum for team member recognition and offers an opportunity to discuss ways to improve future processes and procedures.

Document Lessons Learned

One purpose of the PIER is to document lessons learned. This means that problems encountered by the project team are openly presented. Problem identification on completed projects provides a method to discuss the issue in hopes of eliminating its occurrence in future endeavors. It is important, however, that the problem discussions do not merely point a finger away from the project team. Responsibility and ownership for problem areas are critical to developing useful recommendations for future processes.

Problems that were encountered should be prioritized with focus on the top five to ten problems. One should not attempt to address every problem at this point.

Since problems or sensitive issues may be discussed in the PIER and Lessons Learned, it is helpful to have all contributing parties review the materials prior to finalizing the document. It is useful to have the reviews in an interactive forum where all parties can discuss their recommendations for improvement. The PIER can then present a complete view of the project.

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